

INDIA

Visitors & Market Insights

July 2024



TOURISM NEW ZEALAND'S MARKET APPROACH

Our Purpose

Enrich Aotearoa New Zealand and all who visit.

- Tourism must enrich New Zealand and the wellbeing of New Zealanders – contributing more than what it takes.
- Tourism must create jobs, restore nature, enhance our heritage, build our national reputation and make us proud.

Our Role

To promote New Zealand as a visitor destination to key markets around the world. Tourism New Zealand's new four-year strategy focuses on building desire for New Zealand as a year-round destination and converting that desire into off-peak arrivals. Off-peak seasons refer to the seasons between March-November in New Zealand – autumn, winter and spring.

Market Approach

Tourism New Zealand focuses on shaping the visitor mix through activity across a diverse portfolio of markets.

Our markets are determined by factors including there being an existing or potential group of people actively considering New Zealand as a destination.

Active Considerers

Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These people are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

About our Visitor Insights and Data

TNZ leverage a range of insight sources to support our marketing activity, including TNZ's Active Considerer Monitor, Stats NZ's International Visitor Arrivals and MBIE's International Visitor Survey.

Mix of Markets

The mix of markets covered in our Market Snapshots include:

- Australia
- China
- United States
- Germany
- Japan
- United Kingdom
- India



TRAVELLER INSIGHTS

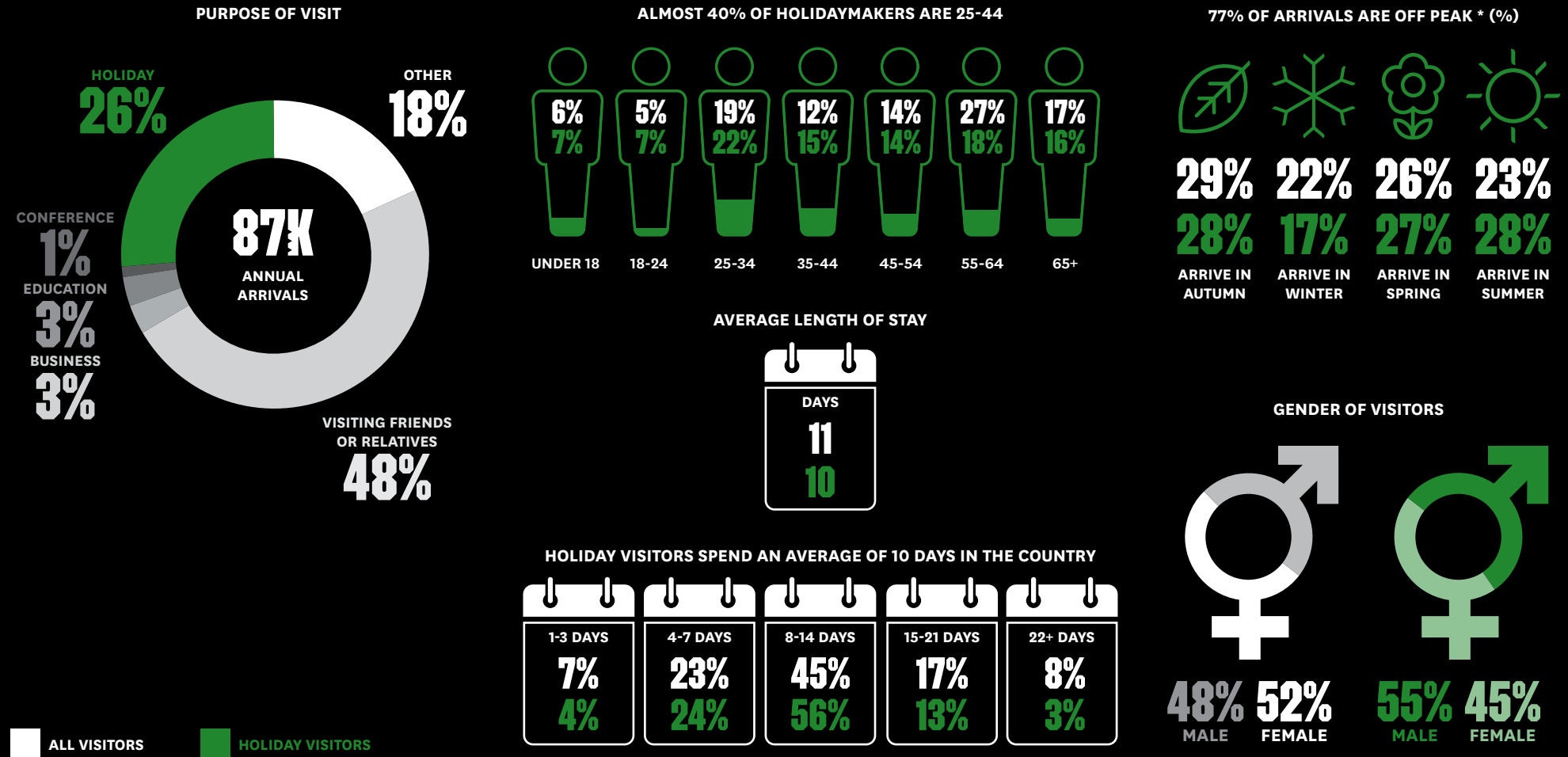
Latest India market arrival insights



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Last year, 87,000 Indian travelers (3.3% of all arrivals) visited New Zealand, with 23,000 (26%) of them being holiday visitors.



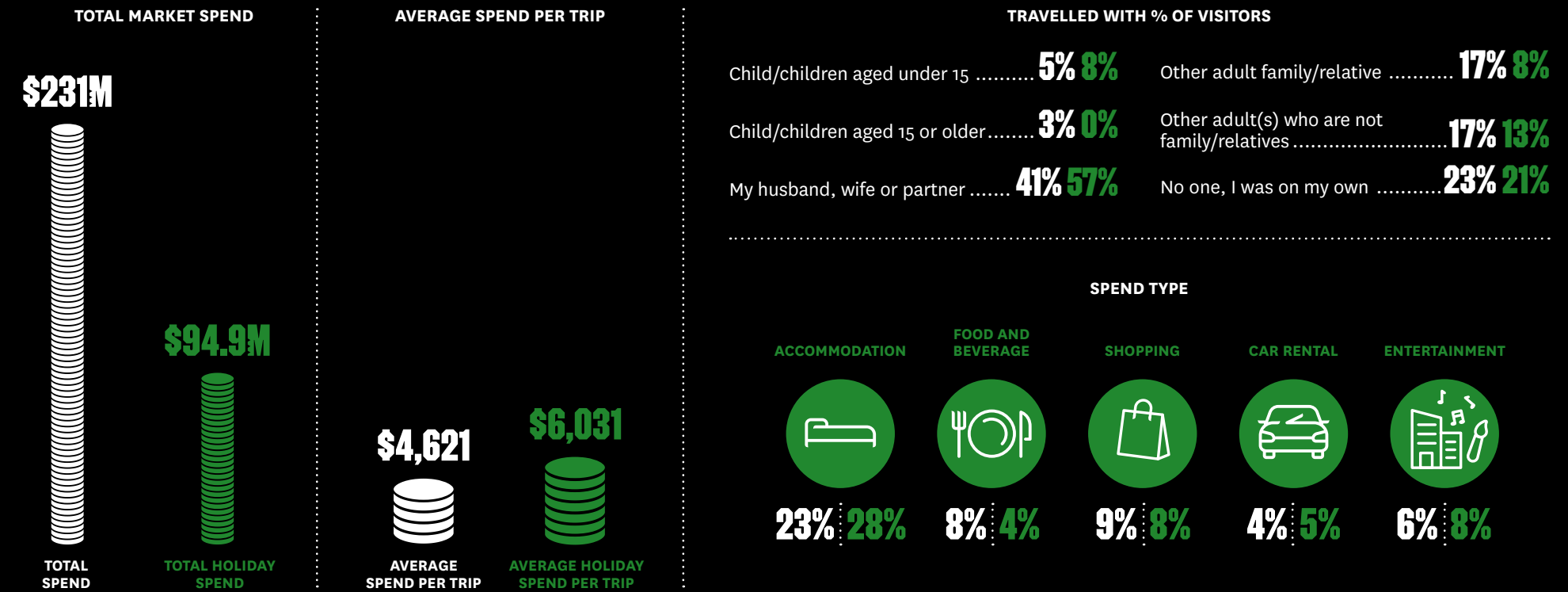
Source: Stats NZ international Visitor Arrivals – Year ending April 2024 –
*Seasons: Autumn 23, Winter 23, Spring 23, Summer 23/24

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VISITOR SNAPSHOT



Indian visitors spent \$231 million in New Zealand, with \$94.9 million by holidaymakers. The average spend per trip was \$4,621, rising to \$6,031 for holiday visitors. For holiday visitors, over a quarter of spending was on accommodation, and visitors were most likely to travel with their significant other.



ALL VISITORS HOLIDAY VISITORS

Source: MBIE, International Visitor Survey | Year ending March 2024

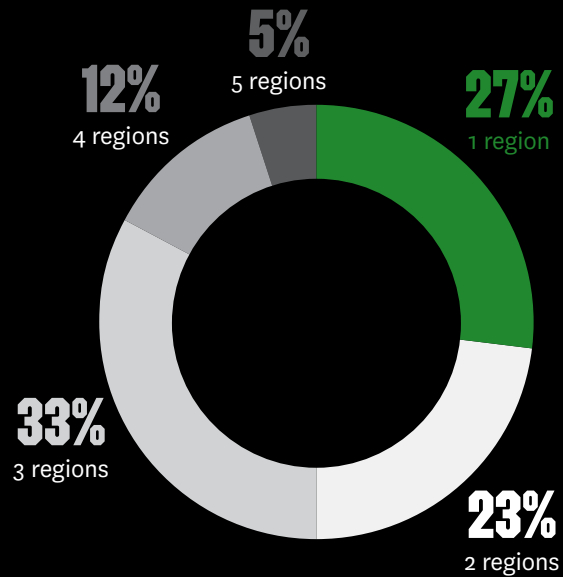
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TRAVELLER INSIGHTS

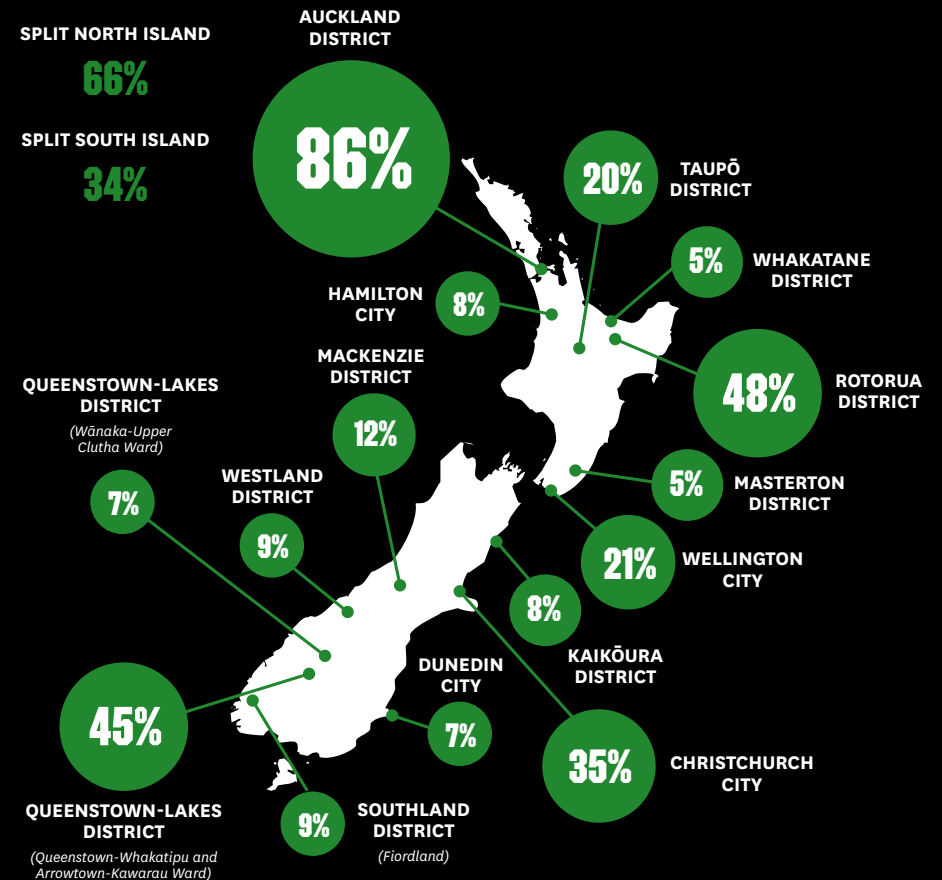


Indian holiday visitors spent the majority of their time in the North Island (66% of nights), while 34% of nights were spent in the South Island. Among them, 16% visited four or more regions, with Auckland being the most popular destination.

NUMBER OF REGIONS VISITED PER VISIT



REGIONS VISITED PER VISIT



Source: MBIE, International Visitor Survey | Year ending March 2024

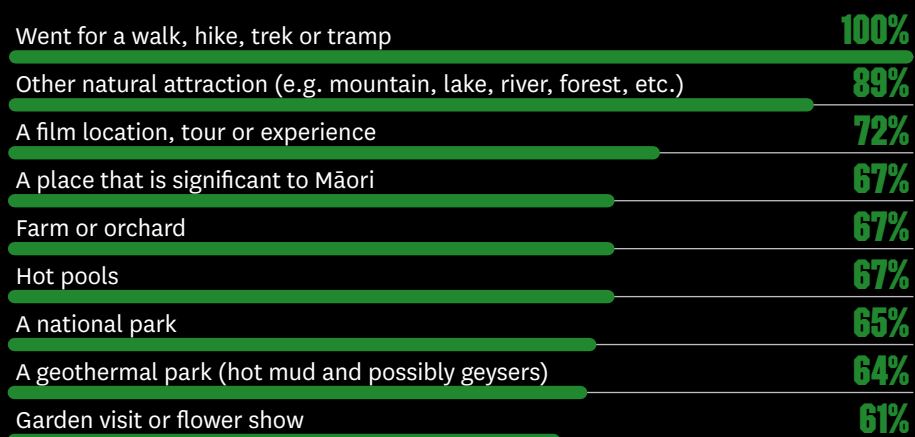
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TRAVELLER INSIGHTS

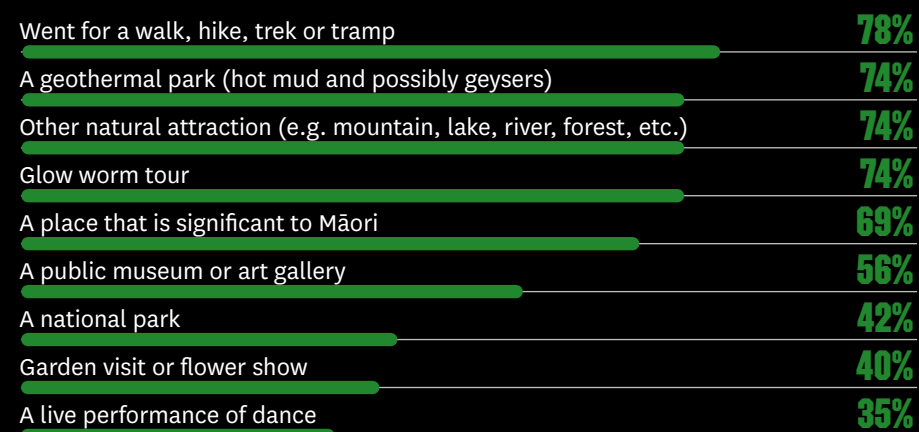


Most visitors favoured natural attractions like walks and hikes, mountains and lakes, and geothermal attractions. Over two-thirds of Indian holiday visitors visited a place of Māori significance across the seasons.

TOP ACTIVITIES ENJOYED BY INDIAN VISITORS IN NEW ZEALAND - SUMMER



TOP ACTIVITIES ENJOYED BY INDIAN VISITORS IN NEW ZEALAND - OFF-PEAK (MAR - NOV)



100%

Walk, hike, trek or tramp



89%

Other natural attractions



72%

A film location,
tour or experience

78%

Walk, hike, trek or tramp



74%

A geothermal park



74%

Other natural attraction

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TRAVELLER INSIGHTS



Most visitors opted for hotels, and luxury accommodation was popular among visitors from this market. Taxis/shuttles and tour buses were popular transport options among holidaymakers.

POPULAR ACCOMMODATION TYPES



64%

Hotel



22%

Luxury
Accommodation

22%

House/Apartment booked
online (AirBnb etc)

18%

With family or friends



16%

Backpackers



12%

Youth Hostel,
YMCA, YWCA

12%

Motel, Motor Inn or
Serviced Apartment

11%

House/flat that you
paid some rent for

10%

Bed and
Breakfast

MODES OF TRANSPORT



27%

Taxi/shuttle service



27%

Tour bus



23%

Local bus service



18%

Plane
(within New Zealand)

16%

Rental car



14%

Bus service between
towns/cities

14%

Uber or other
app based

13%

Other boat or ship



13%

Scenic trains

OUR AUDIENCES

Our Active Considerers

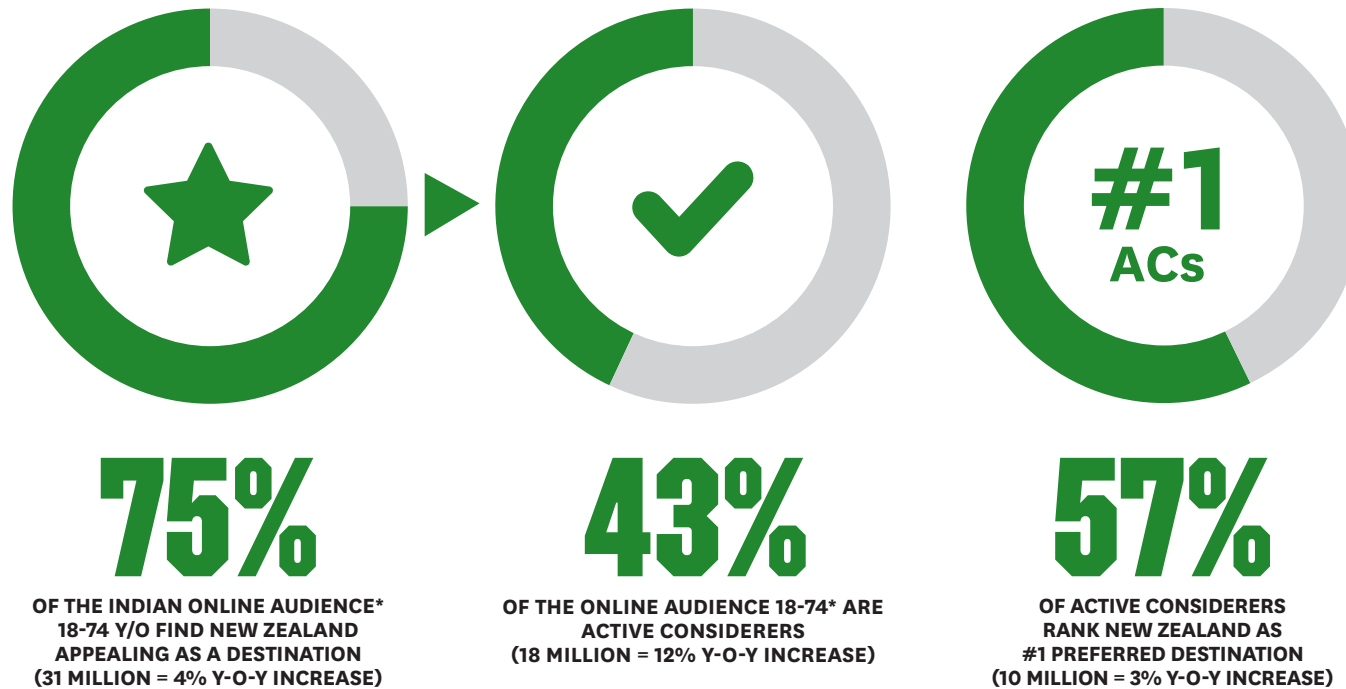
Among those considering overseas travel, Tourism New Zealand is focused on attracting Active Considerers, our target marketing audience. These international holiday travellers are aged 18-74, find New Zealand highly appealing, have New Zealand as a preferred holiday destination to visit in the next three years, and they have the means to do so.

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ACTIVE CONSIDERERS

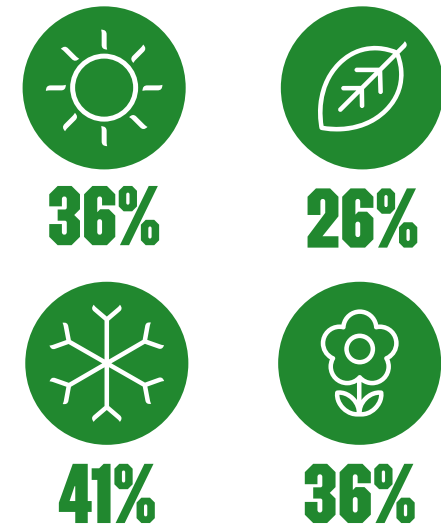


There are around 18 million active considerers in India*, with 57% identifying New Zealand as their top destination choice.



SEASONAL CONSIDERATION

When would Active Considerers visit New Zealand (Non-exclusive)



TOTAL OFF-PEAK CONSIDERATION**



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor May 2024

*Target cities are New Delhi, Bangalore and Mumbai

**Percentage of active considerers who would consider visiting between March and November

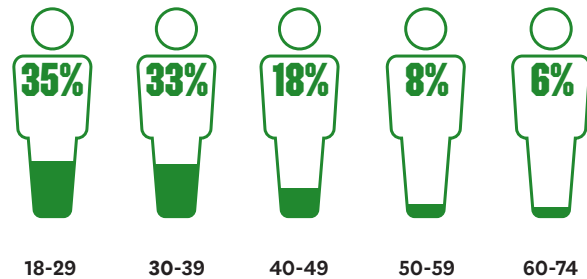


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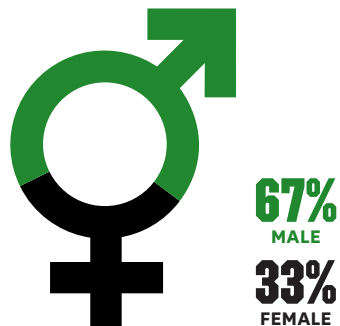
ACTIVE CONSIDERERS

Active Considerers are largely under 40 years old, and nearly 1 in 4 have an annual household income of over INR 5M.

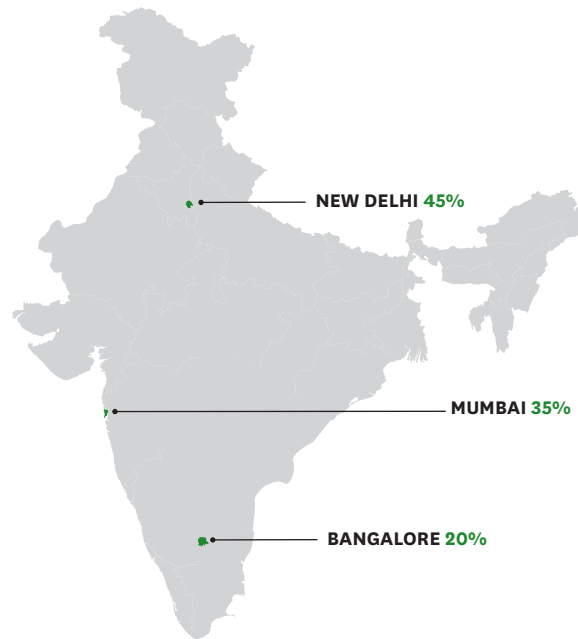
OVER 2/3 ACS ARE BETWEEN 25-54 YEARS



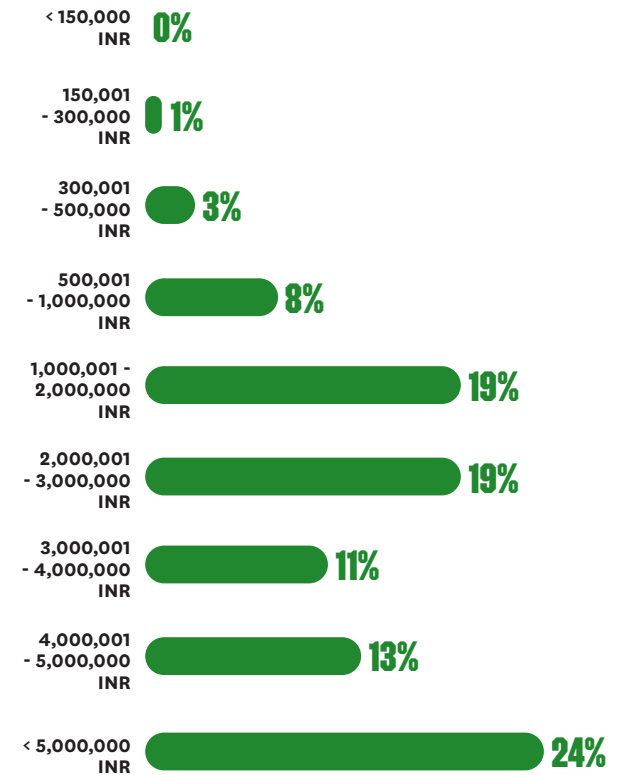
GENDER OF ACS



ACTIVE CONSIDERERS SKEW LARGELY WHERE THERE ARE DIRECT FLIGHT ROUTES



ANNUAL HOUSEHOLD INCOME SPREAD - ACS



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor May 2024

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ACTIVE CONSIDERERS



Among Indian Active Considerers, New Zealand is known as a year round family holiday location, with a pristine environment and a wide variety of activities on offer.

BRAND ASSOCIATIONS



SUITABLE FOR A HOLIDAY
ALL YEAR ROUND

84%



THE ENVIRONMENT THERE
IS CLEAN AND UNPOLLUTED

81%



IDEAL FOR A FAMILY HOLIDAY

80%



OFFERS A WIDE VARIETY OF
OUTDOOR & ADVENTURE ACTIVITIES

79%



A DESTINATION THAT EMBRACES
VISITORS OF ALL CULTURES

79%



HAS A UNIQUE INDIGENOUS
CULTURE

78%



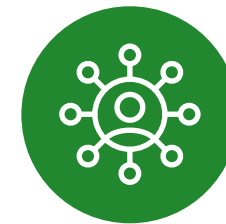
A PLACE THAT INVITES
EXPLORATION AND DISCOVERY

78%



THINKING ABOUT VISITING MAKES
ME FEEL REALLY EXCITED

77%



OFFERS A WIDE VARIETY OF
TOURIST EXPERIENCES

77%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor May 2024

INDIA

ACTIVE CONSIDERERS



Taking in New Zealand's beautiful landscapes, and taking a break from everyday life to experience something new, are key reasons why our Indian Active Considerers want to visit New Zealand.

REASONS TO VISIT NEW ZEALAND



Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor May 2024

INDIA

ACTIVE CONSIDERERS



Our Active Considerers look forward to experiencing our wildlife, exploring our main cities and exploring our natural elements such as lakes, rivers and beaches.

ACTIVITIES SPARKING INTEREST AMONG THOSE INTENDING TO VISIT



WILDLIFE EXPERIENCES

90%



EXPLORING MAIN CITIES

90%



LAKES & RIVERS

89%



SHOPPING FOR LOCAL
ARTS & CRAFTS

89%



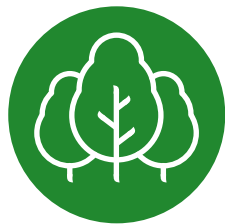
BEACHES & COASTS

89%



MOUNTAINS & ALPINE AREAS

89%



VISITING NATIONAL PARKS

89%



VISITING HISTORICAL SITES

88%



VISITING MUSEUMS & GALLERIES

87%

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor May 2024

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ACTIVE CONSIDERERS

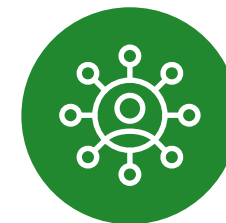


Key concerns and knowledge gaps for prospective visitors include weather conditions, safety of activities, travel distances in New Zealand, and the range of cuisine on offer.

KNOWLEDGE GAPS FOR CHOOSING NEW ZEALAND AS A HOLIDAY



WHAT THE WEATHER IS LIKE

48%HOW SAFE IT IS TO PARTICIPATE
IN ADVENTURE ACTIVITIES**45%**HOW LONG IT TAKES TO TRAVEL
BETWEEN THE MAIN ATTRACTIONS**44%**THE RANGE OF QUALITY FOOD
AND BEVERAGE OPTIONS**43%**WHETHER NEW ZEALAND IS
A PLACE THAT IS ACCEPTING
OF PEOPLE FROM DIVERSE
BACKGROUNDS AND LIFESTYLES**41%**HOW WELCOMING
THE LOCALS ARE**41%**WHERE I SHOULD GET INFORMATION
ABOUT ORGANISING A HOLIDAY**40%**WHAT PRACTICES ARE IN PLACE TO
KEEP ME SAFE FROM COVID (E.G.
MASKS, HAND SANITISER ETC.)**39%**WHETHER THERE IS A BROAD ENOUGH
VARIETY OF THINGS TO SEE AND DO**35%**

Active Considerers (ACs) are aged 18-74, have New Zealand as a preferred holiday destination in the next three years, and have the means to do so.

Source: Active Considerer Monitor May 2024

NGĀ MIHI